

Bridging digital divides

Unifying sales operations through Salesforce for a leading cybersecurity and risk management enterprise

The Modernization
Engineering Company



Summary

Sonata Software partnered with a global cybersecurity and risk management leader to consolidate and optimize their Salesforce landscape following a major acquisition. The merger had led to disparate systems that slowed down sales processes and impacted revenue growth. Sonata streamlined operations by unifying Salesforce instances, automating key workflows, and enhancing customer experience through Experience Cloud and DocuSign integration. The result: improved operational efficiency, shortened sales cycles, enhanced customer experience, and 100% accurate data migration enabling unified agent performance tracking.

Customer overview

A UK-based public cybersecurity and information assurance company headquartered in Manchester, United Kingdom. It specializes in services like software escrow, cybersecurity consulting, and managed services.

Pressure points

The client’s acquisition resulted in two distinct Salesforce environments with fragmented processes, leading to inefficiencies across lead management, contract creation, and performance tracking.

Post-acquisition disparate IT systems creating operational silos and limiting revenue growth potential

Manual lead conversion processes consuming excessive time across dual Salesforce environments

Underutilized Experience Cloud limiting customer self-service capabilities and product visibility

Time-intensive manual contract creation in both organizations reducing sales productivity

Absence of unified agent performance metrics preventing effective resource optimization and management oversight

Legacy workflow and process builders requiring modernization to support business scalability

Solution highlights

Sonata Software implemented a unified Salesforce Sales Cloud and CPQ solution, merging two Salesforce instances into one cohesive platform. Automated workflows, enhanced visibility, and integrated tools such as DocuSign improved efficiency and customer experience.

Complete user migration and Salesforce org consolidation with unified sales process implementation

Intelligent lead automation for assignment and conversion, eliminating manual intervention

Experience cloud transformation using Site Builder for superior product catalog and service visibility

End-to-end automated service contract generation directly from opportunities

DocuSign integration enabling secure electronic contract execution

Comprehensive management and user-level reports and dashboards for performance tracking

Results that speak volumes

Enhanced operational efficiency and productivity through single org consolidation with streamlined lead-to-contract processes

Seamless electronic contract signing through DocuSign integration, reducing turnaround time and improving customer convenience

Elevated customer experience with Experience Cloud case tracking capabilities and transparent service visibility

By the numbers

100% data migration accuracy using SQL Data Loader

Shorter sales cycle achieved through intelligent lead automation and unified workflows